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THE IMPACT OF CULTURE ON TOURISM IN CANADA

A Review of Travel and Festival Surveys



Research & Evaluation
Canada Council
March 23, 1980



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INTRODUCTION

During the December 1979 Council Meeting, the Board "suggested that Research & Evaluation might try a correlation between trends in tourist trade statistics and festival attendance, to give some indication of the relative significance of the festival program and the tourist season in producing audiences." *

The data necessary to draw meaningful statistical correlations between tourism and festival attendance does not currently exist. Labour-Force Surveys do not presently 'break-out' attendance by Canadian tourists at cultural events. Steps have been taken by Research & Evaluation to obtain such a 'break-out' in the future. What data do exist are largely of a one-time nature. Nevertheless, available information does provide some indication of the role of culture - both on a national level and on the level of specific cultural events - in attracting visitors to Canada.

This report has been divided into three parts according to the types of information currently available.

The first part consists of general statistics on tourism in Canada. The size of tourism in Canada, the origin of tourists, and expenditure by tourists are noted.

The second part consists of five surveys of tourists from the United States, Great Britain, France, Africa, Asia, Latin America, and Oceania. The surveys were undertaken to establish demographic and attitudinal profiles of actual or potential visitors to Canada with a view to developing marketing strategies for tourism to Canada. Readers should be cautioned that findings of the different travel surveys may not be comparable. In the case of the British and French surveys, the sample was composed of 'target' groups considered potential travellers to Canada. The

NOTES

- * This request arose from discussion of a grant awarded to Festival Lennoxville.

other two surveys are of persons who have actually visited Canada. In addition the wording and thrust of the questions differ. For the most part cultural activities are either left undefined or defined very broadly in the questions. Where defined, cultural activities include such things as visits to historical places, museums, galleries, arts and crafts exhibits. As a result, the travel surveys provide only the most general indication of the relationship between culture and tourism.

The third part of the study consists of three surveys of major cultural festivals: the Stratford Festival Survey, 1972; the Shaw Festival Survey, 1973; and the National Arts Centre Survey, 1974. Conducted by the Ontario Ministry of Industry and Tourism, the surveys were intended to assist in the marketing of the festivals by ascertaining the socio-economic characteristics of visitors, and their recreational patterns and expenditures in the regions involved. From each of the surveys the following indicators have been collected: attendance, origin of visitors, reasons for visiting the festival region, previous visits to the festival, expenditure, expenditure by length of stay, expenditure by origin area, and economic impact on the area. These surveys are somewhat dated and it is hoped that follow-up studies may someday be undertaken. Because of this limitation data has been expressed, wherever possible, in terms of percentages instead of absolute numbers. As the same indicators are used in each survey, and are expressed in percentages, meaningful comparisons can be made.

Findings are displayed as a series of abstracts, by survey. Where warranted, observations on particular surveys are included, following the abstracts. These observations are based on the survey data, but are not the comments of the survey authors, unless otherwise noted. Summaries are located at the end of the travel and festival survey sections.

TOURISM IN CANADA *

It is estimated that during 1977 tourism receipts in Canada exceeded \$10 billion, or about 5% of Gross National Product (this figure compares with the approximately \$4.5 billion in revenue from the Canadian Cultural Industries in 1977). Tourism is the country's sixth largest earner of foreign exchange and yields annually more than \$5 billion in revenue to the various levels of government. The bulk of Canada's tourism comes from Canadians - an estimated \$8 billion in 1977. That same year, spending by foreign visitors rose to \$2 billion. Approximately \$1.5 billion of that sum came from the 31.8 million Americans travelling in Canada. Visitors from countries other than the United States totalled 1.4 million in 1977, and contributed \$497 million in revenue to the Canadian economy. During 1977 there were 372,165 tourists from the United Kingdom, 157,845 from Germany, 97,532 from Japan, 90,512 from France, 71,195 from the Netherlands, 51,348 from Australia, 46,981 from Italy, 35,164 from Switzerland, and 25,890 from Mexico.

NOTES

* Source: Canadian Government Office of Tourism. Travel Is Your Business, 1977.

TRAVEL SURVEYS *

The current potential market for Canada in each country as a portion of the adult population is very similar...The appeal of Canada is highest in Great Britain and lowest in the Netherlands ... "Outstanding scenery" was Canada's top attractive feature in all four countries.

(quoted from European Communications Tracking Study: Phase I and II.)

UNITED STATES (1)

... History and culture are rising interests - even as the educational levels of international travellers is lower.

(quoted from Travel Pulse 1978-79.)

For the past two years Travel and Tourism Consultants has conducted an annual survey of American tourists called Travel Pulse. In its most recent survey covering 1978 it found that:

American Travellers. 79 million, or 52%, of Adult Americans reported taking a trip either domestically or internationally. Of that number 11 million, or 9% travelled internationally.

Travel to Canada. 26% of American international travellers, or 3.6 million persons, came to Canada in 1978 (compared with 21% in 1977). In the five years ending in 1978, 38% of American international travellers had visited Canada. Canada was the most 'popular' international destination for American tourists.

General Motivation. Major motivations for a trip to Canada included interest in the country's natural beauty as well as shopping, local events and restaurants.

Cultural Motivation. 16% of American travellers to Canada in 1978 considered cultural pursuits to be a motivation for their trip (compared with 21% in 1977). 14% specified museums, galleries and historic places as motivating features (compared with 19% in 1977). 3% specified theatre, opera, music and dance as a trip motivation (compared with 6% in 1977).

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* Survey titles are listed in the bibliography and are identified by the numbers in brackets.

Cultural Activities. 54% of American international travellers in 1978 participated in cultural pursuits (compared with 52% in 1977). 43% specified having visited Museums (compared with 47% in 1977). 24% specified having attended the theatre (the same percentage as in 1977).

Most Enjoyable Trip Activities. 19% of American international tourists in 1978 considered cultural pursuits as one of their most enjoyable trip activities (compared with 20% in 1977). 12% specified attending museums as one of their most enjoyable activities (compared with 14% in 1977). 6% specified attending the theatre as one of their most enjoyable trip activities (compared with 8% in 1977).

UNITED KINGDOM (2)

... Canada has a relatively weak image for those aspects of a holiday connected with city and night life. The country is not readily associated with activities such as ... theatre ... or places of cultural interest, except among those who have actually visited the country, among whom the image is much stronger. To broaden the appeal of Canada, therefore it may be necessary to increase awareness of this aspect of Canadian life among those who have not visited the country.

(attitude of British tourists towards Canada. U.K. Attitudes To Canada As a Holiday Destination.)

During 1977 a survey commissioned by the Canadian Government Office of Tourism was conducted to determine British attitudes towards vacationing, with particular emphasis on Canada. The survey, entitled U.K. Attitudes To Canada As A Holiday Destination, quantified the attitudes and demographic characteristics of potential visitors to Canada with a view to assisting in marketing Canada as a holiday destination. From an initial survey of 6,108 individuals, a market target group of 242 individuals was assembled, which was comprised of 192 persons who had taken a long-haul holiday in the three years previous to 1977 and 50 persons who expected to take such a trip in the two years after that date. The findings relevant to the impact of culture on tourism in Canada were:

British Long-Haul Travel. 6% of British adults had taken a holiday in a country outside Europe or North Africa in the three years ending in 1977. 1.3% of all respondents had taken a trip to Canada. 31% of the target group had visited Canada on their last long-haul holiday.

Long-Haul Holiday Motivation. The main motivation for visiting a foreign country was to see a friend or relative. 2/3 of the target group gave this as the main reason for first considering a holiday in the country they visited. 4/5 of those travelling to Canada considered visiting friends or relatives as their main motivation.

Long-Haul Trip Activities. Long-haul holiday takers actually took part in more activities than they claimed to have been looking for. The most popular activities were sight-seeing and visiting places of historical, cultural or other special interest. 1/2 of all long-haul holiday takers 'looked into' places of historical, cultural or other special interest, and 2/3 actually took part in those activities.

Activities Looked For. Among those in the target group who had visited Canada 36% 'looked into' places of historical, cultural or other special interest at the time when they decided on their holiday (compared with 46% for the U.S.A. and 59% for other countries).

Activities Taken Part In. Among those who had visited Canada, 56% actually took part in visits to places of historical, cultural or other special interest (compared with 70% for the U.S.A. and 65% for other countries). Visitors to Canada were rather less likely to visit places of historical or other special interest than were visitors to the U.S.A. or other long-haul destinations. Among those who had been to Canada, visits to places of historical, cultural or other special interest ranked fourth after sight-seeing, shopping and dining out.

Features Desirable In a Holiday Destination. Of those who had visited Canada, 40% considered 'lots of historical and cultural interest' a desirable feature of Canada. Canada's rank order in comparison with other long-haul destination for this category was third, following Spain and the U.S.A., but ahead of Scandinavia, the West Indies, South Africa, and Australia. However, 'lots of historical and cultural interest' ranked only fifteenth as a desirable feature of a holiday in Canada. However, this feature was a low priority for all destinations examined.

Activities Canada Would Be Expected To Offer. Among those who had visited Canada at any time, 51% expected that Canada would offer visits to places of historical or other special interest. Among those who had not visited Canada, 42% expected that Canada would offer such attractions .

Activities They Would Take Part In. Among those who had previously visited Canada, 45% felt that they would take part in visits to places of historical or other special interest if they visited again. Of those who had not previously visited, 39% indicated that they would take part in such activities if they visited.

Observations

The authors noted that the British survey results indicate that there was a wide discrepancy between the activities people would expect Canada to offer and the activities they would expect to take part in if they visited Canada. A relatively small proportion of the sample considered Canada to offer outstanding opportunities for activities such as visits to the cinema or theatre, or places of cultural interest. However, a far higher proportion of persons who had visited Canada associated it with those activities. And a large proportion of persons who associated Canada with those activities would expect to take part in them if they visited. According to the authors this suggests two things: "firstly, these sorts of activities are very relevant to the target market, and secondly those who have not visited Canada previously are not likely to associate the country with those activities, but those who have had previous experience with the country are much more likely to do so."

FRANCE (3)

... il s'agit de deux aspects un peu plus spécifiques de l'intérêt pour la culture et la nature du pays: plus de quart de ces voyageurs jugent essentiel d'aller vers un pays doté d'une riche histoire culturelle et plus du quart jugent essentiel par ailleurs d'y retrouver de la grande nature sauvage.

(quoted from La clientèle française des vacances en pays de long courrier et ses attitudes à l'égard du Canada.)

During 1979 a study of French attitudes towards long-haul holidays, and holidays in Canada in particular was undertaken. The study was commissioned by the Canadian Government Office of Tourism and was a follow-up to the 1977 British survey. As in the case of the British study an initial survey was used to establish a target group composed of persons who had taken long-haul holidays within the three years prior to 1979, or were likely to do so in the near future. The relevant survey findings were:

Activities Looked Into. 63% of the target group had looked into visits to cultural or historic sites and gatherings when deciding on their long-haul holidays. 10.1% looked into theatre or concert performances.

Activities Participated In. 64% of the target group actually took part in visits to historical or cultural sites and gatherings during their long-haul holidays. 17.3% actually attended theatre or concert performances.

Features Associated With a Destination. 14.3% of the target group associated a Canadian Holiday with 'lots of historical and cultural interest'. Canada ranked sixth in a cross-country comparison in this regard, behind Mexico (67%), India (62%), Japan (42%), Brazil (24%), the United States (16%), and ahead of the Antilles (6%).

Satisfaction With Canadian Features. 56.4% of the target group indicated that there were good chances of being satisfied with the 'folklore' of Canada, and 18.3% stated that there was little chance of being so satisfied. 56.2% indicated that there was a good chance of being satisfied with the 'purchase of arts and crafts' in Canada, and 26.8% stated that there was little chance of being so satisfied.

AFRICA, ASIA, LATIN AMERICA, OCEANIA (4)

This study was compiled by the Marketing Research Section, Research Division of the Canadian Government Office of Tourism. Data was based on an exit survey of overseas travellers from Africa, Asia, Latin America and Oceania to Canada in the summer of 1977. The study found that the most common trip purposes of overseas travellers were visits to friends and relatives, pleasure travel and business. Australians and New Zealanders, Mexicans and Japanese were highly inclined to visit Canada for their own pleasure. Travel to visit friends and relatives was higher among respondents from the Caribbean and Africa and business was especially attractive to Japanese, Africans, and Latin Americans (other than Mexicans). Respondents from Mexico and Australia/New Zealand participated in a higher average number of activities while in Canada. Urban types of activities were more popular with all categories of travellers. While activities such as eating out and shopping were participated in most often, a large proportion of travellers also visited museums, art galleries, and historic sites and buildings. The three survey questions relevant to the impact of culture on tourism concern the percentage of visitors from each country actually participating in a given activity

in Canada. These findings, along with the average number of activities engaged in by persons from each country are displayed. Figures in brackets indicate the rank order of popularity of that activity, out of the fourteen activities investigated. (Rank orders were independently calculated from data in the report.)

Average Number of Activities. Mexico, 6.8; Australia/New Zealand, 6.7; Japan, 6.1; Other Asia, 6.1; Other Latin America, 5.1; Caribbean, 5.1; Africa, 5.1.

Visiting Museums, Art Galleries. Mexico, 54% (5); Other Asia, 51% (5); Australia/New Zealand, 50% (6); Japan, 41% (5); Other Latin America, 41% (6); Africa, 29% (6); Caribbean, 27% (7).

Visiting Historic Sites, Buildings. Mexico, 55% (4); Australia/New Zealand, 55% (5); Other Asia, 51% (5); Other Latin America, 43% (5); Africa, 41% (5); Japan, 39% (6); Caribbean, 33% (6).

Attending Festivals, Exhibitions, Special Events. Mexico, 24% (11); Caribbean, 22% (8); Other Latin America, 20% (10); Australia/New Zealand, 19% (13); Japan, 15% (12); Other Asia, 15% (12); Africa, 14% (12).

Travel Survey Summary

In general Canada has a relatively weak image with regard to cultural activities. Canada is not readily associated with such activities. Foreigners most often think of Canada as a country which offers outstanding natural beauty and sightseeing opportunities. There is, however, a wide discrepancy between the activities which individuals expect Canada to offer and those which they actually participate in during visits. A higher proportion of persons who had visited Canada associate it with places or events of cultural interest, and these persons were more likely to visit such places. Similarly, while a relatively small percentage of persons considered cultural activities to be a primary motivation for visiting Canada, a larger percentage reported participating in those activities during their trip. It is worth noting again that cultural activities as defined in the travel surveys include such things as visits to historical places, museums, galleries, arts and crafts exhibits. Where 'high culture' activities were specified, percentages were considerably lower (as might be expected). For instance 16% of American travellers to Canada considered cultural pursuits in general to be a major motivation for their trip, but only 3% specified opera, music and dance as major motivators.

FESTIVALS

Whether it be the annual Barnum Festival in Bridgeport ... or the Cultural Arts of Indianapolis, all of these events affect the economic vitality of the cities and regions they serve. These events are multi-dimensional in their impact ... First there is the spending by local patrons of these events- a dinner out, a bus trip in, or perhaps some other downtown expenditure associated with the event. Second, there are the expenditures by visitors from outside the community. Visitors bring dollars into the area which otherwise would not have entered the local economy...

(quoted from, Lawrence Davidson & William Schaffer.
A Discussion of Methods Employed In Analyzing the
Impact of Short Term Entertainment Events.)

SHAW FESTIVAL (5)

This report, based on a survey of visitors to the Shaw Festival during 1973, analyzed the socio-economic characteristics of visitors, and their recreational patterns and expenditures. Conducted at the request of the Shaw Festival, this survey, like the other festival surveys, was intended to provide insight into the marketing potential of the festival and its impact on the economy of the Niagara region. In some cases, data refers to 'festival parties'. This term was used for a group of people attending the festival together, such as a household. Findings directly relevant to the impact of culture on tourism are summarized below:

Attendance. Total attendance at the festival in 1973 was 109,999 person visits (compared with 140,000 in 1978). Of that total, 103,654 person visits were defined for the survey. There were 36,600 'festival parties' comprised of 97,200 individuals, or an average of 2.7 persons per party.

Origin of Visitors. Ontario was the origin for 68.4% person visits. Metro Toronto was the dominant market accounting for 32.2% of total person visits. The Niagara Region itself ranked second within the province and third overall with 20.1% of total person visits. The Central Region of Ontario, excluding Metro Toronto, stood third within the province or fourth overall, with 6.6% of the total. New York State was the most important market outside of Ontario, accounting for 25.5% of total person visits. Almost all of the New York State visitors came from the area close to the Ontario border along the Niagara River, including the urban areas of Buffalo, Niagara Falls and Rochester. Of the remaining person visits, 1.5% were from Canada outside of Ontario, 1.4% from Michigan, 0.7% from Ohio, 1.3% from the rest of the United States, and 1.2% from Europe.

Reasons For Visiting the Niagara Sector. 91.7% of those surveyed gave visiting one of the two festival theatres as their primary reason for visiting the Niagara Sector. 3.0% stated that visiting friends or relatives was their primary reason, 2.0% that visiting Niagara-on-the-Lake was their primary reason, and 1.3% that vacationing was their primary motivation (In comparison, 11.1% gave attending the festival as a secondary reason, 6.9% that visiting friends or relatives was a secondary motive, and 50.8% that visiting Niagara-on-the-Lake was a secondary reason.)

Previous Visits to the Festival. 47.2% of the parties were attending the Shaw Festival for the first time in 1973. Parties who had visited at least once before had attended for an average of 3.4 years.

Expenditure. Expenditures in the Niagara Sector by visitors to the Shaw Festival in 1973 amounted to \$1,729,000 or \$47.30 per party. Most of this expenditure was for food and beverages (36.1%), theatre tickets (29.9%), accommodation (18%), and personal merchandise (10%). Only 4% of party expenditure was on transportation.

Expenditure By Length of Stay. Almost 70% of the parties did not stay overnight, remaining for an average of 6.4 hours. These parties spent an average of \$32.10 at the festival. Of the remaining 30%, the average length of stay was 2.1 days. These parties spent an average of \$82.50.

Expenditure by Origin Area. Parties from Ontario accounted for 71.6% of total festival expenditures, or an average of \$49 per party. Within Ontario, Metro Toronto parties spent the most in the Niagara Sector, 36.9% or an average of \$51.10 per party. The Niagara Region was the source for 12.3% of total expenditures, or \$29.30 per party. New York State was the major source of expenditure for parties outside of Ontario. New York parties spent 21.3% of the total, or an average of \$40.10 per party. Parties from Michigan accounted for 2.6% of total expenditure, or \$98.10 per party. Ohio parties spent 1.3% of the total, or an average of \$95.20 per party. Interestingly, persons from the rest of the United States, as well as Canadians from outside Ontario, spent only an average of \$32.80 per party, and Europeans \$52.50 per party.

Economic Impact On the Niagara Sector. Expenditure on tickets was 29.9% of total expenditures. The remaining 70.1% was spent on various goods and services (as detailed above). Thus for every dollar spent on tickets, an additional \$2.34 was spent on ancillary items. That is, the Shaw Festival generated expenditures on other goods and services amounting to 2.34 times that on theatre tickets.

Observations

These survey highlights show that the Shaw Festival plays an important role in attracting tourists to the Niagara Sector, and as such, has a significant economic impact on the area. Almost all those attending the festival were in the area, primarily, for that event. It will be noted, however, that the festival was very much a regional event. While persons from outside the region spent a good deal more per party, they account for a relatively small amount of total visitation and expenditure. In addition the festival was largely an Ontario centered event. The survey authors note that Metro Toronto, approximately 90 miles from Niagara-on-the-Lake, recorded a slightly higher incidence of visitation per 100,000 population (1,593) than Metro Buffalo, only 20 to 30 miles away (1,554). The authors conclude that this "indicates stronger cultural ties between Toronto and Niagara-on-the-Lake. It also indicates that there is additional market potential for the Shaw Festival in the nearby Buffalo area."

FESTIVAL CANADA: NATIONAL ARTS CENTRE SURVEY 1974 (6)

This survey was conducted among N.A.C. visitors who attended one or more of the 19 opera and theatre performances held during Festival Canada, which ran from July 18-30, 1974. Findings relevant to the impact of culture on tourism are summarized below:

Attendance. Total attendance during the survey period, to both opera and theatre performances, amounted to 20,145 person visits generated by 9,877 'festival parties' (averaging 2 persons per party).

Origin of Visitors. Residents of Ottawa/Hull made up 66.3% of total person visits. Metro Toronto accounted for 3.8% of person visits and the rest of Ontario for 4.7%. Montreal was the origin for 6.8% of those attending and the rest of Quebec for 8.3%. Other Canadian provinces contributed 1.9% of person visits. New York State was the most important market outside of Ontario and Quebec, accounting for 2% of those attending. Of the remaining visitors, 2.7% were from the rest of the United States, 0.9% were from Europe and 0.1% from other foreign countries.

Reasons For Trip to Ottawa/Hull Region (non-residents only). Among the primary reasons of non-residents were: to attend N.A.C. performance(s) (37.3%), vacationing (15.3%), visiting friends and relatives (11.3%), sightseeing (5.1%), business (4.1%), and shopping (0.6%). Among the secondary reasons given by non-resident visitors for visiting the Ottawa-Hull Region were to attend N.A.C. performance(s) (9.5%), vacationing (14.4%), visiting friends and relatives (9.4%), and shopping (3.4%).

Previous Visits to the N.A.C. The majority of visitors from the Ottawa/Hull Region had previously attended a performance at the N.A.C. (95.2%). 90.6% had attended at least once in 1974. 78.8% of non-resident visitors attended at least one previous performance at the N.A.C. in 1974.

Expenditure. Total expenditure by visitors to the N.A.C. during Festival Canada was \$310,397.

Expenditure by Area of Origin. The Ottawa-Hull region accounted for 24.2% of total expenditure. Visitors from Toronto accounted for 10.8%, and the rest of Ontario for 12.1%. Montreal visitors contributed 11.9%, and the rest of Quebec 14.2%. Canadian provinces other than Quebec or Ontario accounted for 6.9%. New York State accounted for 6.9% of the total, and those from the rest of the United States 7.9%. Visitors from Europe and other foreign countries accounted for 3% of total expenditure.

Expenditure By Residents and Non-Residents. Non-resident visitors were asked to estimate the party expenditure during their stay in the Ottawa/Hull region. Resident visitors estimated their spending only for a visit to the N.A.C. Average spending per resident party was \$11.46. Total spending by residents was approximately \$75,000 of which 65.3% was spent on tickets, 25.0% on food and beverages associated with N.A.C. visits, 6.5% on transportation within the region, 2.3% on other entertainment, 0.6% on personal merchandise and souvenirs, and 0.3% on accommodation. Average spending per non-resident party was \$70.65. Total non-resident expenditure was estimated at over \$235,000 of which 29.2% was for food and beverages, 24.9% was for accommodation, 16.5% was for N.A.C. tickets, 14.7% was for personal merchandise and souvenirs, 10.3% was for transportation within the region and 4.5% was for other entertainment. (Percentage breakdowns were independently derived from data contained in the Festival Canada Survey).

Economic Impact. Resident expenditure on tickets was 65.3% of total expenditure. The remaining 34.7% was spent on various goods and services (as listed above). Thus for every dollar spent on tickets an additional 53¢ was spent on ancillary items. Non-resident expenditure on tickets was 16.5% of total expenditure. The remaining 83.5% was spent on various goods and services (as listed above). Thus for every dollar spent on tickets an additional \$5.01 was spent on ancillary items. If the two groups are added together, 28.3% of total expenditure was on tickets. The remaining 71.7% was spent on various goods and services. Thus for every dollar spent on tickets, an additional \$2.53 was spent on ancillary items. (Ancillary expense indicators were independently derived from data in the Festival Canada Survey).

Observations

These findings indicate that the attraction of Festival Canada was, as with the Shaw Festival, primarily regional. Unlike the Shaw Festival, however, there were few foreign visitors to Festival Canada (only 5.7% of the visitors were foreigners). This difference may stem, in part, from Ottawa's being non-contiguous with a highly populated American border. The authors note that "an explanation for attendance from outside the area rests with the Ottawa/Hull region itself being an important destination for many distant pleasure ... as well as business trips." The N.A.C.'s location "in the national capital, allows it to meet the cultural needs of many Canadians who make their occasional visits to the Capital City." The vast majority of those visitors were, however, from Ontario and Quebec. For the majority of those from outside Central Canada attendance was probably incidental to their trip to the Capital and not a primary motivation.

STRATFORD FESTIVAL SURVEY 1972 (7)

In assessing the ultimate result of outside revenue such as tourist expenditure on domestically produced goods and services, it is necessary to introduce the concept of the economic multiplier. When a tourist expenditure occurs in an economy, the level of income immediately increases. However, the impact does not end here. The recipient will spend some part of this additional income upon locally produced goods and services and this will in turn become the additional income in an economy. By this process, the ultimate increase in income will exceed the initial tourist expenditure and the over-all income in a local economy will rise. The ultimate size of the income depends upon the proportion of leakages in each subsequent round. Examples of leakages would be taxes and imports. If the local economy for which the measurements are made is very small and not self-supporting, the size of economic multiplier approaches one, and hence no significant magnification of original tourist expenditure can be achieved.

(quoted from Stratford Festival Survey, 1972.)

This study was conducted by the Tourism and Recreation Branch of the Ontario Ministry of Industry and Tourism at the request of the Stratford Festival Foundation of Canada. The report was based on a survey of visitors to the 1972 Stratford Festival, the Box Office Report 1972, the Stratford Visitor Survey 1966, and other related material. Its objective was to determine the socio-economic characteristics of festival visitors, their recreational behaviour and experience in Stratford, in order to assist in marketing the festival. Findings for the 1972 season, relevant to the impact of culture on tourism, are summarized below:

Attendance. Total person attendance at the 1972 Stratford Festival was 421,882 (compared with 517,000 in 1978). Those attending school performances (100,579) and the Film Festival (8,695), making up 25.9% of total attendance, have not included in the analysis unless otherwise noted. The survey comprised approximately 100,800 party visits, generated by 44,000 individual parties that included 136,400 individuals purchasing 312,608 tickets.

Origin of Visitors. Ontario was the origin of 39.7% of total person attendance. Metro Toronto alone accounted for 16.7% of total person visits. The Central Ontario Economic Region (including Metro Toronto) accounted for approximately half of the provincial attendance at the performances. Other Canadian Provinces were of modest significance in terms of total visits. Quebec was the origin for 2.6% of person visits, Manitoba for 0.5%, and the other provinces for 1.4%. Among non-Canadian places of origin Michigan was the leader with 24.0% of total person attendance, followed by New York State with 11.8%, Ohio with 5.1%, Illinois with 4.1%, Pennsylvania with 2.0%, and the rest of the United States with 8.3%. Only 0.5% of person attendance was from Europe and 0.2% from other foreign countries.

Reasons For Visit to Stratford. Attendance at the Stratford Festival was by far the primary motivation indicated by respondents (95.4%). 44.4% gave vacationing as a secondary reason for visiting Stratford, and 26.4% listed attending the festival as the secondary reason, followed by shopping at 9.2%, and visiting friends and relatives at 6.7%. The authors noted that there is clearly a significant relationship between attendance at the festival and vacation-taking. Many "respondents were visiting Stratford as part of an annual vacation indicating for this group the festival events had a strong advantage over a wide range of alternative activity possibilities". Shopping and visits to friends and relatives were also combined with festival attendance. There was also a tendency to differentiation by area of origin. Visits to friends and relatives were more frequently stated by Ontario residents, while Americans often combined their visit to Stratford with their vacation. Some secondary reasons indicated that the visit to Stratford was part of and somewhat incidental to a more general trip.

Previous Visits to the Festival. 25.9% of festival parties were attending the Festival for the first time in 1972. Repeat visitors had attended the festival for an average of 5.9 years. The average number of attendance years for all festival parties was 4.6 years.

Expenditure. The estimated visitor expenditure was \$5,320,000, of which \$4,690,000 was spent by those in the sample, \$500,000 by school groups and \$130,000 by film parties. (Expenditure by these latter two groups is not included in the following estimates). The average expenditure, including ticket purchases, per festival party per party stay in Stratford was \$106.60 or \$34.50 per person. Of the average per party expenditure 35.7% was spent on tickets, 28.9% on food and beverage, 18.7% on accommodation, 12.7% on personal merchandise, 2.2% on transportation in Stratford; and 1.8% on other entertainment.

Expenditure By Length of Stay. Approximately 46% of festival parties left the same day, staying in Stratford an average of seven hours. The parties spent an average of \$43.10 and accounted for 18.8% of total expenditure. 81.2% of the parties remained overnight, staying an average of 2.8 days. These parties spent an average of \$116.69 per stay.

Expenditure by Origin Area. Ontario was the leading source of expenditure, accounting for 29.9% of total expenditure, or an average of \$62.00 per party. Visitors from Quebec made up 2.4% of total expenditure, or \$139.00 per party; Manitoba 0.4% or \$93.00 per party; and those from other provinces 0.8% or \$83.00 per party. American visitors as a whole accounted for 65.5% of total expenditure. Michigan made up 27.2% or \$148.000 per party; New York State 12.6% or \$165.00 per party; Ohio 6.5% or \$171.00 per party; Illinois 6.2% or \$204.00 per party; Pennsylvania 2.0% or \$156.00 per party; and the rest of the United States 11.0% or \$159.00 per party. European visitors accounted for only 0.4% of total expenditure or \$48.00 per party and those from other foreign countries 0.1% or \$53.00 per party.

Economic Impact of the Festival. The 136,000 visitors to the 1972 Festival exceeded the total Stratford population of 24,700 by 5.5 times. Visitor expenditure of \$5,320,000 was equivalent to 7.4% of personal disposable income of Stratford residents or 10.4% of total retail sales in the city. In addition there was a significant 'export' factor involved as nearly all expenditure was brought from outside the local Stratford economy and about 70% from outside Ontario. The authors estimated that the local multiplier for the City of Stratford would be rather low, close to 1, because of the limited size of the area and the resulting high leakage. Expenditures on tickets was 35.7% of total expenditure. The remaining 64.3% was spent on various goods and services. Thus for every dollar spent on tickets, an additional \$1.80 was spent on ancillary items. (The ancillary expenditure indicator was independently calculated from data in the report.) The provincial multiplier was estimated, by the authors, to be approximately 2.5 to 3.0.

Observations

The survey highlights indicate that the Stratford Festival had a much wider appeal than the other festivals examined. American visitors made up over 55% of total person attendance at the Festival. In addition, American visitors to the Stratford Festival came from farther afield than those Americans attending the other two festivals. The number of Canadian visitors from outside the host province was slightly higher for the Stratford Festival at 4.5%, although the incidence of other foreign visitors was equally small. As with the other Festivals examined, visitors from outside the region had an economic impact disproportional to their numbers. Ontario accounted for almost 40% of total person attendance but only 29.9% of total expenditure. American visitors, on the other hand accounted for 55% of total person attendance but 65.5% of total expenditure. The low average expenditure of European visitors indicates that these persons, unlike many Americans, did not come primarily to attend the Festival and remained only a short time. (Europeans accounted for 0.5% of person attendance but only 0.4% of total expenditure.)

FESTIVAL SURVEY SUMMARY

The festival surveys indicate that there were significant differences in the attraction of the Stratford, Shaw and National Arts Centre Festivals.

Festival Canada (N.A.C.) was very much a regional event. A large majority of those attending were from the Ottawa/Hull area (66.3%). Americans made up less than 5% of attendance and Canadians from outside the host province only 1.9% (if Ontario/Quebec is considered the host province). Europeans made up 0.9% of those attending, and other foreigners 0.1%. Significantly only 37.3% of festival visitors from outside Ottawa/Hull gave attendance at the N.A.C. as their primary reason for being in the area. As with the other two festivals, visitors to Festival Canada from outside the host area had an economic impact disproportional to their numbers. Over 90% of visitors as a whole, and 79% of non-residents, had attended at least one previous performance at the N.A.C. during 1974. A useful measure of

the economic impact of festival visitors is the ancillary expenditure figure which indicates how much the average individual spends on ancillary items for each dollar spent on tickets. The ancillary expenditure figure for Festival Canada was 2.53. This figure appears rather high in comparison to figures for the other festivals as it includes only expenditure by non-residents.

The Shaw Festival, although also an essentially regional event, benefited from its proximity to the United States. While only 1.5% of visitors were Canadians from outside the host province, almost 30% of those attending were Americans. The majority of these American visitors were from areas adjacent to the host site. Europeans constituted 1.2% of those attending. In contrast to Festival Canada, 91.7% of all those at the Shaw Festival gave attendance as their primary reason for visiting the region. Almost 53% had attended the festival at least once previously. The ancillary expenditure figure for the Shaw Festival was 2.34.

The Stratford Festival had a much wider appeal than the other two festivals. Americans made up over 55% of total attendance, and came from much further afield than those at the Shaw. Canadian visitors from outside the host province made up 4.5% of total attendance. Europeans accounted for 0.5% of total attendance, and other foreigners for 0.2%. Of those persons at the festival, 94.5% gave attendance as their primary reason for visiting the region. Over 70% of visitors had attended the festival at least once previously. The ancillary expenditure figure for the Stratford Festival was 1.80.

CONCLUSION

A recent article from the National Endowment for the Arts describes the burgeoning efforts of the United States Commerce Department to use the arts as a means of promoting economic development .^{*} Louise Weiner, the special assistant responsible for overseeing the funding program, is quoted as referring to the arts as 'people magnets'. "That is", she explained, "they stimulate tourism, expand demand for nearby restaurants and transportation, and enrich neighborhoods in a way that increases a city's tax base." This same article, however, goes on to note that recent research by the United States Travel Service, which is charged with stimulating tourism from abroad, shows that cultural opportunities are only a minor force in motivating foreign tourists to visit that country.

The N.E.A. article illustrates the seemingly contradictory findings which result from a study of the impact of culture on tourism. Like the N.E.A. article this study found differences in impact when considering specific cultural events as opposed to foreign tourist motivation on a general level. In fact these differences are what one would logically expect to find.

The travel surveys reviewed clearly indicate that only a small percentage of foreign tourists consider cultural opportunities as a primary motivation for travelling. While Canada fared slightly worse in this regard than some other countries examined in the surveys, few countries if any can claim 'high culture' as a major motivator. Tourists are a diversified lot and travel for a variety of reasons. It is only reasonable to expect that a limited number will be attracted by 'high culture'. In the case of Canada, geographical attractions - that is scenery - overshadow other attributes in the minds of tourists as a whole.

NOTES

- ^{*} National Endowment for the Arts. *Cultural Post*. Issue 26, November/December, 1979. The Economic Development Administration has funded among other things the construction of a year-round facility for the Oregon Shakespeare Festival. In the theatre's first year attendance from outside the remote host site jumped by 59,000, bringing \$667,000 in tourist spending into the arts.

The festival surveys show, however, that there is a segment of the domestic and foreign populations who will travel primarily to attend cultural events, and repeat their attendance. With proper marketing this 'target group' might be further developed within the already established market in Canada and the northern United States, as well as farther afield. The travel surveys suggest that such future expansion may be feasible. While only a small percentage of tourists are initially motivated to visit Canada by cultural opportunities, a far larger percentage take advantage of those opportunities during their visit. In addition, these persons are more likely to return to Canada and repeat their cultural activities.

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